

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, May 26, 2009
8:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of April 24, 2009

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Daniels, Shirley	MERF
Tozzoli, Edith	CITY-ANN

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Atkinson, James	HMEA	Service	26	62
Brown, Raymond	Local 760	Service	31	56
Donofrio Jr., Anthony	Local 760	Service	31	58
Gamzon, Sandra	Library	Early	16	56
Leto, Penelope	HMEA	Service	26	58
Real, Yolanda	Local 2221	Early	11	56
Rojano, Ramon	CHPEA	Vested Service	15	59
Talgo, Jon	CHPEA	Early	19	55
Valentin, Celia	HMEA	Service	25	63

IV. Pension Benefit Adjustments

V. Separations from Pension Payroll

VI. Requests for Refunds of Contributions

VII. Consideration of Proposed MERF Budget for Fiscal Year 2009-2010

VIII. Other Business

**Pension Commission
Pension Administration Agenda
May 26, 2009**

PENSION DATA

II. Survivor Benefits

Daniels, Shirley, survivor of the late William Daniels, member of the Municipal Employees' Retirement Fund (MERF) who died February 20, 2009 (Survivor benefits under the MERF; Emp. #S930537 / 980163)

Date of Birth: July 5, 1934
Effective Date: March 1, 2009
Annual Allowance: \$ 6,168.00
Monthly Allowance: 514.00

Tozzoli, Edith, survivor of the late Carmen Tozzoli, member of the Municipal Employees' Retirement Fund (MERF) who died April 4, 2009 (Survivor benefits under the MERF; Emp. #S733407 / 980162)

Date of Birth: November 2, 1924
Effective Date: May 1, 2009
Annual Allowance: \$ 2,141.28
Monthly Allowance: 178.44

III. Regular Retirements

AMOUNT

Atkinson, James

Emp. # 940814 / 990139

Union: HMEA

Date of Birth: June 6, 1946

	Years	Months	Days
Term of Service (including Sick Exchange):	26	0	0
Sick Exchange:	4	0	0

Grounds: Service

Effective Date: April 25, 2009

Average Salary: Highest 2 out of last 5 years \$ 80,559.52

Pension Allowed: 70.00 % 56,391.72

Monthly Payment: 4,699.31

Pension Commission
Pension Administration Agenda
May 26, 2009

III. Regular Retirements (continued)

AMOUNT

Brown, Raymond

Emp. # 071870 / 990141

Union: Local 760

Date of Birth: July 25, 1952

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	6	0	0
Grounds:	Service		
Effective Date:	May 4, 2009		
Average Salary:	Final Rate of Pay		\$ 67,205.41
Pension Allowed:	85.00 %		57,124.56
Monthly Payment:			4,760.38

Donofrio Jr., Anthony

Emp. # 207403 / 990142

Union: Local 760

Date of Birth: August 17, 1950

	Years	Months	Days
Term of Service (including Sick Exchange):	31	7	6
Sick Exchange:	3	7	6
Grounds:	Service		
Effective Date:	May 3, 2009		
Average Salary:	Final Rate of Pay		\$ 69,966.88
Pension Allowed:	85.00 %		59,471.88
Monthly Payment:			4,955.99

Gamzon, Sandra

Emp. # 830321 / 990144

Union: Library Non-Union

Date of Birth: August 6, 1952

	Years	Months	Days
Term of Service (including Sick Exchange):	16	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	March 21, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 68,380.56
Pension Allowed:			
Unreduced Pension:	32.00%		\$ 21,881.76
Early Reduction Factor:	4.00 % for each year prior to age 60		12.00 %
Reduced Pension:			\$ 19,255.92
Monthly Payment:			1,604.66

Pension Commission
Pension Administration Agenda
May 26, 2009

III. Regular Retirements (continued)

AMOUNT

Leto, Penelope

Emp. # 442461 / 990138

Union: HMEA

Date of Birth: April 4, 1951

	Years	Months	Days
Term of Service (including Sick Exchange):	26	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	May 22, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 77,786.48
Pension Allowed:	70.00 %		54,450.48
Monthly Payment:			4,537.54

Real, Yolanda

Emp. # 902994 / 990137

Union: Local 2221

Date of Birth: January 5, 1953

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	February 17, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 26,946.33
Pension Allowed:			
Unreduced Pension:	27.50%		\$ 7,410.24
Early Reduction Factor:	4.00 % for each year prior to age 60		12.00 %
Reduced Pension:			\$ 6,521.04
Monthly Payment:			543.42

Rojano, Ramon

Emp. # 942911 / 990136

Union: Non-Union

Date of Birth: May 2, 1950

	Years	Months	Days
Term of Service (including Sick Exchange):	15	0	0
Sick Exchange:	4	0	0
Grounds:	Vested Service		
Termination Date:	July 16, 2007		
Effective Date:	May 4, 2009		
Average Salary:	Highest 5 out of last 10 years		\$ 114,618.61
Pension Allowed:	37.50 %		42,981.96
Monthly Payment:			3,581.83

**Pension Commission
Pension Administration Agenda
May 26, 2009**

III. Regular Retirements (continued)

AMOUNT

Talgo, Jon

Emp. # 942360 / 990140

Union: CHPEA

Date of Birth: February 18, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	19	0	0
Sick Exchange:	4	0	0
Grounds:	Early		
Effective Date:	April 23, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 77,534.99
Pension Allowed:			
Unreduced Pension:	47.50%		\$ 36,829.08
Early Reduction Factor:	4.00 % for each year prior to age 60		19.00 %
Reduced Pension:			\$ 29,831.52
Monthly Payment:			2,485.96

Valentin, Celia

Emp. # 940995 / 990143

Union: HMEA

Date of Birth: December 31, 1945

	Years	Months	Days
Term of Service (including Sick Exchange):	25	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	May 1, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 53,180.94
Pension Allowed:	67.75 %		36,030.12
Monthly Payment:			3,002.51

**Pension Commission
Pension Administration Agenda
May 26, 2009**

IV. Pension Benefit Adjustments

The following adjustments are attributable to earnings from gainful employment, as reported on the Earned Income Affidavits required from disabled pensioners in accordance with the requirements of Sections 2A-11c (4), 2A-31g (1), and 2A-33g (1) of the Municipal Code of the City of Hartford. A portion of the earned income is used to offset or otherwise reduce the disability pension as determined by the Municipal Code and union contracts.

The status of the requests sent and responses received as of May 19, 2009 is as follows: Certified reminder letters were mailed on April 30, 2009.

Requests Sent:	188
Affidavits Returned:	183
Affidavits not sent due to age (70 or older), home bound, nursing home	
Residency or under care of a conservator:	63
Outstanding:	5

It is recommended that the following pension adjustments be made effective on May 1, 2009, in accordance with past practice.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>	<u>ADJUSTED MONTHLY PENSION</u>
246328	Ferranti, Albert	Local 760	\$ 0.00	\$ 0.00
941141	Gonzalez, Rafael	HPU	2,691.75	2,582.25
940346	Hernandez, Alma	HMEA	1,856.00	1,857.61
477125	Mansfield, Alonzo	HPU	1,322.94	1,299.30
942447	Salsgiver, Valerie	HPU	1,200.69	503.07

The Affidavit sent to the following individual was returned by the Post Office. In past years, as required by the Municipal Code, Section 2A-11(c), the Pension Benefit was reduced to \$0.00 because she did not have the required 10% reduction in her earnings to meet the Disability Eligibility Provision. We will continue to try to locate her and will adjust her Pension Benefit accordingly at such time as we receive the affidavit.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>
942197	Williams, Carrie	SCGA	\$ 0.00

Pension Commission
Pension Administration Agenda
May 26, 2009

IV. Pension Benefit Adjustments (continued)

The following individuals have not returned their Earned Income Affidavits and, as required by the Municipal Code, it is recommended that their pensions be suspended effective with the May 2009 payment.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>
050997	Blue, Mike	Local 760	\$ 1,724.24
901806	Brown-Hollis, Deborah	Local 2221	964.38
136662	Cooper, Johnny	Local 760	3,189.02
903052	Horn, Diane	Local 2221	457.77
940267	Pu'sey, Harold	HPU	1,737.10

V. Separations from Pension Payroll

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF BIRTH</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
370266	Cole, Barbara	04/20/1919	04/06/2009	\$ 1,502.34	MERF
138320	Cormier, Aurore	08/26/1913	04/16/2009	124.39	MERF
S228249	Dwyer, Marie	06/04/1916	04/28/2009	950.99	FRF
477702	Manzi, Andrew	09/09/1929	04/04/2009	4,485.27	MERF
507785	McNally, Mary	05/28/1925	04/02/2009	791.46	FRF
S556700	Nolan, Nora	07/14/1930	04/24/2009	1,940.66	MERF
605166	Powers, Marguerite	03/01/1919	04/25/2009	375.22	FRF
619876	Redmond, Arline	03/06/1921	04/23/2009	438.56	MERF
733407	Tozzoli, Carmen	07/16/1918	04/04/2009	356.88	CITY-ANN

**Pension Commission
Pension Administration Agenda
May 26, 2009**

VI. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Antoine, Terry	\$ 10,473.20
Brannick, Sean	10,385.80
Dodson, David	9,234.87
Maduro, Reuben**	693.70
Morales, Iris	12,305.42
Thomas, John	3,229.09
Vardal, Michael	3,620.11
Velaquez-Torre, Justina*	106.64
Winalski, Helen	3,579.45

None of the above members is vested, or, if vested, has been informed of, and has waived, his or her rights to a vested benefit in lieu of a contribution refund.

The amounts shown above do not include interest accrued after 2002.

* Additional contributions due to the member.

** Beneficiary of deceased active MERF member [Eleanore Davila](#)